



TREZONA ACCOUNTING & TAXATION SERVICES

Alice Springs NT 0870

Your handy tax checklist for preparing for your 2020 tax return

We have made it easy to ensure that you are best prepared in claiming your deductions when we lodge your tax return

INCOME

- Income statement from *myGov* account
- Centrelink or Veteran Affairs statements
- Allowances, earnings, tips, directors' fees
- Employer lump sum payments
- Lump sum & Termination Payments
- Interest from banks & building societies
- Trust & partnership distributions
- Rental property income
- net capital gains
- Foreign source income (including foreign pensions) & foreign assets or property
- Information on dividends & shares purchased or sold

WORK-RELATED EXPENSES

(statements as at 30 June)

- Work-related car expenses
Please supply details of km if travelled below 5,000kms. Log book & detailed of expenditure incl. capacity of vehicle is required if claiming greater than 5,000kms
- Work-related travel expenses
Please provide details of any work related travel expenditure (travel, accommodation, food etc.) that were not reimbursed by work
- Work-related uniforms / protective clothing
Receipts for protective clothing, boots, shoes, laundry expenses and uniforms

- Work-related self-education expenses

Please provide description of expenses incurred

- Other work-related expenses
 - Union fees & subscriptions
 - Telephone (inc mobile) & internet
 - Home office expenses
 - Stationary bought for work
 - Sunscreens, sunglasses or hat
 - Tools & equipment
 - Computer usage & software
 - Camping supplies if you work out bush
- Medicals if required to have one for work
- Tour supplies if you are a tour guide

OTHER EXPENSES

- Other work-related expenses
- Details/receipts for any gifts or donations greater than \$2
- Bank fees & management charges on interest bearing accounts in relation to investments only
- Non-employer sponsored superannuation details inc name & policy number of fund & amount paid into fund
- Last year's Tax Agent fees (for new clients)
- Income Protection Insurance

TAX REFUNDS

Remember to provide your bank account details including your BSB & Account number for any tax refund.

You can also take advantage of our *Fee from Refund* service, if you are receiving a refund.

REBATES / OFFSETS

If you are eligible to claim any of the following rebates, please provide details for each:

- Spouse's name, date of birth & taxable income (if applicable)
- Number of dependent children inc names, date/s of birth, income earned
- Parenting payments (Centrelink)
- Sole parent – whole year / part of year (please provide dates if part of year)
- Superannuation paid for spouse
- Private Health Cover – please provide statement, member name & number

OTHER INFORMATION

- Do you have a HECS/HELP debt or student loan?